

TEACHERS' RETIREMENT BOARD

REGULAR MEETING

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SUBJECT: Contract Activity Report

ITEM NUMBER: 14

ATTACHMENT(S): 3

ACTION: \_\_\_\_\_

DATE OF MEETING: April 8, 1999

INFORMATION: X

PRESENTER Ms. Plett

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Ms. Plett will present an oral report.

**CONTRACT ACTIVITY REPORT**  
**CALIFORNIA STATE TEACHERS' RETIREMENT BOARD**  
**JULY 1, 1998 THROUGH DECEMBER 31, 1998**

ATTACHMENT I

03/23/1999

**CONTRACTS AUTHORIZED BY THE TEACHERS' RETIREMENT BOARD**

| CONTRACT<br>NUMBER | CONTRACTOR NAME                          | DATES      |            |            | ENCUMBERED<br>AMOUNT | TOTAL<br>CONTRACT<br>AMOUNT | PURPOSE   | STATUS | AWARD<br>METHOD | SERV.<br>TYPE | MBE<br>WBE<br>DVB | SML<br>BUS |
|--------------------|--|------------|------------|------------|----------------------|-----------------------------|---|--------|-----------------|---------------|-------------------|------------|
|                    |  | EFFECTIVE  | ACTION     | EXPIRED    |                      |                             |   |        |                 |               |                   |            |
| Contract Type: AMD |  |            |            |            |                      |                             |   |        |                 |               |                   |            |
| 93-046             | C A3 INVESCO                             | 02/18/1994 | 11/02/1998 | 02/18/1999 | 0.00                 | 0.00                        | NAME CHANGE FROM CHANCELLOR LGT ASSET<br>MANAGEMENT | A      | RFP-2           | C-INV         | Y                 |            |
| 94-065             | C A2 CALIFORNIA INVESTMENT TRUST FUND GP | 07/01/1995 | 12/01/1998 | 06/30/1999 | 0.00                 | 0.00                        | EXTEND TERM AND UPDATE LANGUAGE                     | A      | RFP-2           | C-INV         | Y                 |            |
| Contract Type: IAA |  |            |            |            |                      |                             |   |        |                 |               |                   |            |
| 98-011             | S TEALE DATA CENTER                      | 07/01/1998 | 05/05/1998 | 06/30/1999 | 1,500,000.00         | 1,500,000.00                | DATA PROCESSING                                     | A      | EXEMPT          | S-DP          |                   |            |
| 98-043             | S CONTROLLER'S OFFICE, STATE             | 07/01/1998 | 06/24/1998 | 06/30/1999 | 681,100.00           | 681,100.00                  | BENEFIT, RPPPA, WARRANT PROCESS                     | A      | EXEMPT          | S-GEN         |                   |            |
| Contract Type: STA |  |            |            |            |                      |                             |   |        |                 |               |                   |            |
| 98-021             | S LOS ANGELES COUNTY SCHOOLS             | 07/01/1998 | 04/28/1998 | 06/30/2001 | 440,332.00           | 1,388,147.00                | REGIONAL COUNSELING COORDINATOR                     | A      | EXEMPT          | S-GEN         |                   |            |
| 98-055             | C MELLON CAPITAL MANAGEMENT CORP.        | 09/03/1998 | 05/18/1998 | 06/30/2000 | 0.00                 | 0.00                        | DOMESTIC EQUITY ENHANCED INDEX                      | A      | RFP-2           | C-INV         | Y                 |            |
| 98-056             | C STATE STREET GLOBAL ADVISORS           | 10/15/1998 | 10/15/1998 | / /        | 0.00                 | 0.00                        | DOMESTIC EQUITY ENHANCED INDEX                      | A      | RFP-2           | C-INV         | Y                 | N          |
| 98-057             | C BARCLAYS GLOBAL INVESTORS              | 10/27/1998 | 10/26/1998 | 10/26/2010 | 0.00                 | 0.00                        | DOMESTIC EQUITY ENHANCED INDEX                      | A      | RFP-2           | C-INV         | Y                 | N          |
| 98-059             | C BRINSON PARTNERS, INC.                 | 11/01/1998 | 10/31/1998 | 10/31/2010 | 0.00                 | 0.00                        | DOMESTIC EQUITY LARGE CAP INDEX                     | A      | RFP-2           | S-INV         | Y                 | N          |
| 98-060             | C BROWN CAPITAL MANAGEMENT               | 11/01/1998 | 11/01/1998 | / /        | 0.00                 | 0.00                        | DOMESTIC EQUITY MANAGER LARGE CAP                   | A      | RFP-2           | S-INV         | Y                 |            |
| 98-061             | C DELAWARE INVESTMENT ADVISERS           | 11/01/1998 | 10/31/1998 | 10/31/2010 | 0.00                 | 0.00                        | DOMESTIC EQUITY LARGE CAP INDEX                     | A      | RFP-2           | S-INV         | Y                 | N          |
| 98-062             | C FIRST QUADRANT, LP                     | 11/01/1998 | 11/04/1998 | 11/04/2010 | 0.00                 | 0.00                        | DOMESTIC EQUITY LARGE CAP INDEX                     | A      | RFP-2           | C-INV         | Y                 | N          |
| 98-063             | C NCM CAPITAL MANAGMENT GROUP, INC.      | 12/01/1998 | 10/30/1998 | 10/30/2010 | 0.00                 | 0.00                        | DOMESTIC EQUITY LARGE CAP INDEX                     | A      | RFP-2           | S-INV         | Y                 | N          |
| 98-064             | C PUTNAM ADVISORY COMPANY, INC.          | 11/01/1998 | 10/31/1998 | 10/31/2010 | 0.00                 | 0.00                        | DOMESTIC EQUITY SMALL CAP INDEX                     | A      | RFP-2           | S-INV         | Y                 | N          |
| 98-065             | C SASCO CAPITAL, INC.                    | 10/30/1998 | 10/30/1998 | 09/30/2010 | 0.00                 | 0.00                        | DOMESTIC EQUITY SMALL CAP INDEX                     | A      | RFP-2           | S-INV         | Y                 | N          |
| TOTALS             |  |            |            |            | \$ 2,621,432.00      | \$ 3,569,247.00             |   |        |                 |               |                   |            |

**CONTRACT ACTIVITY REPORT**  
**CALIFORNIA STATE TEACHERS' RETIREMENT BOARD**  
**JULY 1, 1998 THROUGH DECEMBER 31, 1998**

ATTACHMENT II

03/23/1999

**CONTRACTS AUTHORIZED BY THE CHIEF EXECUTIVE OFFICER**

| CONTRACT NUMBER     |   | CONTRACTOR NAME |                                     | DATES      |            |            | ENCUMBERED AMOUNT | TOTAL CONTRACT AMOUNT | PURPOSE                                | STATUS | AWARD METHOD | SERV. TYPE | MBE WBE DVB | SML BUS |
|---------------------|---|-----------------|-------------------------------------|------------|------------|------------|-------------------|-----------------------|--|--------|--------------|------------|-------------|---------|
|                     |   |                 |                                     | EFFECTIVE  | ACTION     | EXPIRED    |                   |                       |  |        |              |            |             |         |
| Contract Type: AMD  |   |                 |                                     |            |            |            |                   |                       |  |        |              |            |             |         |
| 91-099              | C | A4              | MIG REALTY ADVISORS, INC.           | 01/01/1999 | 12/15/1998 | 06/30/1999 | 0.00              | 0.00                  | TERM EXTENSION TO 06/30/99             | A      |              |            | N           |         |
| 94-066              | C |                 | PNC BANK, N.A.                      | 07/01/1995 | 07/01/1998 | 06/30/1999 | 0.00              | 0.00                  | EXTEND TERM                            | A      | RFP-2        | C-INV      | Y           |         |
| 95-089              | C | A2              | GROOM LAW GROUP                     | 04/30/1998 | 07/18/1998 | 06/30/2000 | 0.00              | 270,000.00            | NAME CHANGE FROM GROOM & NORDBERG      | A      | EXEMPT       | C-LEG      | Y           | N       |
| 96-003              | S | A3              | PRICEWATERHOUSECOOPERS LLP          | 07/01/1996 | 10/16/1998 | 06/30/1999 | 0.00              | 0.00                  | LETTER OF ARRANGMENT LANGUAGE ADDITION | A      | RFP-2        | S-GEN      | Y           |         |
| 96-003              | S | A2              | PRICEWATERHOUSECOOPERS LLP          | 07/01/1996 | 10/16/1998 | 06/30/1999 | 0.00              | 0.00                  | NAME CHANGE FROM COOPERS & LYBRAND     | A      | RFP-2        | S-GEN      | Y           |         |
| 98-004              | S | A1              | HEALTH & WELFARE AGENCY DATA CENTER | 07/01/1998 | 02/18/1999 | 06/30/1998 | 7,000.00          | 19,000.00             | INCREASE DOLLAR AMOUNT OF CONTRACT     | A      | EXEMPT       | S-DP       |             |         |
| 98-090              | S | A1              | FERNANDEZ FINANCIAL ADVISORY        | 12/15/1998 | 12/15/1998 | 06/30/1999 | 1,655.00          | 1,655.00              | ADD CONSULTING TO IMPROVE 1999 FORMAT  | A      | SS           | C-GEN      | N           | N       |
| Contract Type: CMAS |   |                 |                                     |            |            |            |                   |                       |  |        |              |            |             |         |
| 970016              |   |                 | SYNERGY CONSULTING                  | 07/01/1998 | 07/01/1998 | 06/30/1999 | 87,000.00         | 87,000.00             | CONSULTING SERVICES                    | A      | EXEMPT       | S-DP       |             |         |
| 980008              |   |                 | NANRAN, INC.                        | 07/01/1998 | 06/30/1999 | 06/30/1999 | 231,890.40        | 231,890.40            | COMPUTER PROGRAMMING & ANALYSIS        | A      | EXEMPT       | S-DP       |             |         |
| 980009              |   |                 | COMPUTER RESOURCE GROUP             | 07/01/1998 | 07/01/1999 | 06/30/1999 | 115,945.20        | 115,945.20            | MAINTENANCE SERVICES                   | A      | EXEMPT       | S-DP       |             |         |
| 980010              |   |                 | VISIONARY INTEGRATION PROFESSIONALS | 07/01/1998 | 07/01/1998 | 06/30/1999 | 198,000.00        | 198,000.00            | CONSULTING SERVICES-START              | A      | EXEMPT       | S-DP       |             |         |
| 980011              | S |                 | SCIENCE APPLICATION INTL. CORP.     | 07/01/1998 | 07/01/1998 | 06/30/1999 | 104,000.00        | 104,000.00            | OVERSIGHT CONSULTING                   | A      | EXEMPT       | S-DP       |             |         |
| 980012              | S |                 | NANRAN, INC.                        | 07/01/1998 | 07/01/1998 | 06/30/1999 | 158,188.80        | 158,188.80            | COMPUTER PROGRAMMING Y2K               | A      | EXEMPT       | S-DP       |             |         |
| 980015              |   |                 | SYNERGY CONSULTING                  | 07/01/1998 | 07/01/1998 | 12/31/1998 | 98,000.00         | 98,000.00             | CONSULTING SERVICES                    | A      | EXEMPT       | S-DP       |             |         |
| 980257              |   |                 | MATTOX GROUP                        | 09/21/1998 | 06/30/1999 | 06/30/1999 | 35,840.00         | 35,840.00             | CONSULTING SERVICES                    | A      | EXEMPT       | S-DP       |             |         |
| 980289              |   |                 | B & J COMMUNICATIONS                | 09/01/1998 | 09/01/1998 | 06/30/1999 | 2,990.00          | 2,990.00              | MAINTENANCE OF TELEPHONE SYSTEM        | A      | EXEMPT       |            |             |         |
| 980388              |   |                 | VISIONARY INTEGRATION PROFESSIONALS | 11/13/1998 | 10/14/1998 | 06/30/1999 | 111,882.00        | 111,882.00            | CONSULTING SERVICES-START              | A      | EXEMPT       | S-DP       |             |         |
| 980458              |   |                 | NANRAN, INC.                        | 10/30/1998 | 06/30/1999 | 06/30/1999 | 96,021.80         | 96,021.80             | COMPUTER PROGRAMMING & ANALYSIS Y2K    | A      | EXEMPT       | S-DP       |             |         |
| 980620              |   |                 | SYNERGY CONSULTING                  | 01/01/1999 | 12/15/1998 | 03/31/1999 | 116,000.00        | 116,000.00            | DATA CONVERSION PROJECT (START)        | A      | EXEMPT       | S-DP       | N           |         |
| 980640              |   |                 | NANRAN, INC.                        | 12/01/1998 | 12/15/1998 | 03/31/1999 | 62,653.85         | 62,653.85             | SYSTEMS CONSULTATION FOR IFSB          | A      | EXEMPT       | S-DP       | N           |         |
| Contract Type: FS   |   |                 |                                     |            |            |            |                   |                       |  |        |              |            |             |         |
| 96-028              | S | F2              | ANACOMP, INC.                       | 07/01/1998 | 06/01/1998 | 06/30/1999 | 6,098.00          | 17,500.00             | ENCUMBER 98/99 FUNDS                   | A      | EXEMPT       | S-M/R      |             |         |
| 96-039              | S | F2              | HOGAN & HARTSON, L.L.P.             | 07/01/1996 | 07/01/1998 | 06/30/1999 | 150,000.00        | 450,000.00            | ENCUMBER 98/99 FUNDS                   | A      | EXEMPT       | C-LEG      |             |         |
| 96-067              | S | F1              | ORRICK, HERRINGTON & SUTCLIFFE      | 07/15/1997 | 07/01/1998 | 06/30/2000 | 0.00              | 0.00                  | ENCUMBER 98/99 FUNDS                   | A      | EXEMPT       | C-LEG      |             |         |
| 97-002              | S | F1              | TOWERS PERRIN                       | 06/15/1998 | 07/01/1998 | 02/28/2002 | 40,000.00         | 200,000.00            | ENCUMBER 98/99 FUNDS                   | A      |              |            |             |         |
| 97-012              | S | F1              | DATA IMAGE SYSTEMS CORP.            | 07/01/1997 | 07/01/1998 | 06/30/1999 | 2,340.00          | 4,680.00              | ENCUMBER 98/99 FUNDS                   | A      | EXEMPT       | S-GEN      |             |         |
| 97-032              | S | F2              | WATSON WYATT WORLDWIDE              | 10/08/1997 | 07/01/1998 | 12/31/2001 | 146,000.00        | 316,000.00            | ENCUMBER 97/98 & 98/99 FUNDS           | A      | RFP-2        | C-GEN      |             |         |

| CONTRACT<br>NUMBER | CONTRACTOR NAME                  | DATES      |            |            | ENCUMBERED<br>AMOUNT | TOTAL<br>CONTRACT<br>AMOUNT | PURPOSE                                   | STATUS | AWARD<br>METHOD | SERV.<br>TYPE | MBE<br>WBE<br>DVB | SML<br>BUS |
|--------------------|----------------------------------|------------|------------|------------|----------------------|-----------------------------|---|--------|-----------------|---------------|-------------------|------------|
|                    |                                  | EFFECTIVE  | ACTION     | EXPIRED    |                      |                             |   |        |                 |               |                   |            |
| Contract Type: IAA |                                  |            |            |            |                      |                             |   |        |                 |               |                   |            |
| 1998-012 S         | WATER RESOURCES, DEPT. OF        | 07/01/1998 | 05/18/1998 | 06/30/1999 | 3,500.00             | 15,000.00                   | GRAPHIC SERVICES                          | A      | EXEMPT          | S-GEN         |                   |            |
| 1998-014 S         | ZZ - NOT EXECUTED                | 07/01/1998 | 05/05/1998 | 06/30/2000 | 0.00                 | 0.00                        |   | C      |                 |               |                   |            |
| 1998-076 S         | OFFICE OF STATE PUBLISHING       | 07/01/1998 | 06/30/1998 | 06/30/1999 | 201,000.00           | 201,000.00                  | ANNUAL STATEMENT                          | A      | EXEMPT          | S-DP          | N                 |            |
| 98-001 S           | CONTROLLER'S OFFICE, STATE       | 07/01/1998 | 07/01/1998 | 06/30/1999 | 12,960.00            | 12,960.00                   | DEATH MATCH SERVICES                      | A      | EXEMPT          | S-GEN         | N                 |            |
| 98-002 S           | HEALTH SERVICES, DEPT. OF        | 07/01/1998 | 05/01/1998 | 06/30/1999 | 2,700.00             | 2,700.00                    | CERTIFIED COPIES OF DEATH CERTIFICATES    | A      | EXEMPT          | S-GEN         |                   |            |
| 98-003 S           | CSUS - FEDERAL WORK STUDY        | 09/02/1998 | 07/14/1998 | 05/18/1999 | 8,820.00             | 8,820.00                    | 98/99 SCHOOL YEAR                         | A      | EXEMPT          | S-GEN         |                   |            |
| 98-006 S           | LOS RIOS COMMUNITY COLLEGE - FWS | 10/01/1998 | 05/05/1998 | 06/01/1999 | 0.00                 | 0.00                        | FEDERAL WORK STUDY PROGRAM FOR 98/99      | A      | EXEMPT          | S-GEN         |                   |            |
| 98-010 S           | MOTOR VEHICLES, DEPT. OF         | 07/01/1998 | 05/05/1998 | 06/30/1999 | 5,000.00             | 5,000.00                    | 1099R FORMS                               | A      | EXEMPT          | S-GEN         |                   |            |
| 98-013 S           | EDUCATION, DEPT. OF              | 07/01/1998 | 06/16/1998 | 06/30/1999 | 2,500.00             | 2,500.00                    | GRAPHIC ART SERVICES                      | A      | EXEMPT          | S-GEN         |                   |            |
| 98-017 S           | PERSONNEL BOARD, STATE           | 07/01/1998 | 06/19/1998 | 06/30/1999 | 10,000.00            | 15,000.00                   | PERSONNEL SERVICES                        | A      | EXEMPT          | S-DP          |                   |            |
| 98-042 S           | CONTROLLER'S OFFICE, STATE       | 07/01/1998 | 05/05/1998 | 06/30/1999 | 55,000.00            | 55,000.00                   | EFT                                       | A      | EXEMPT          | S-GEN         |                   |            |
| 98-044 S           | CONTROLLER'S OFFICE, STATE       | 07/01/1998 | 05/05/1998 | 06/30/1999 | 40,000.00            | 40,000.00                   | RELEASE INVESTMENT PAYMENT                | A      | EXEMPT          | S-GEN         | N                 |            |
| 98-045 S           | CONTROLLER'S OFFICE, STATE       | 07/01/1998 | 05/05/1998 | 06/30/1999 | 0.00                 | 0.00                        | INTEREST EARNINGS, LOSS OF FLOAT          | A      | EXEMPT          | S-GEN         | N                 |            |
| 98-077 S           | UC PRINTING                      | 07/01/1998 | 07/01/1998 | 06/30/1999 | 10,000.00            | 10,000.00                   | PRINTING & MAILING SERVICES               | A      | EXEMPT          | S-GEN         |                   |            |
| 98-079 C           | STATE PERSONNEL BOARD            | 07/01/1998 | 07/22/1998 | 06/30/1999 | 19,875.00            | 19,875.00                   | INVESMENT OFFICER EXAM SERVICES           | A      | EXEMPT          | C-GEN         |                   |            |
| Contract Type: MRA |                                  |            |            |            |                      |                             |   |        |                 |               |                   |            |
| 98-046 S           | PITNEY BOWES, INC.               | 07/01/1998 | 05/18/1998 | 06/30/1999 | 1,102.00             | 1,102.00                    | USPS METER FOR PARAGON                    | A      | EXEMPT          | S-M/R         |                   |            |
| Contract Type: MSA |                                  |            |            |            |                      |                             |   |        |                 |               |                   |            |
| 1998-048 S         | XEROX CORPORATION                | 07/01/1998 | 05/18/1998 | 06/30/1999 | 2,496.00             | 2,496.00                    | REPAIR & MAINTENANCE FOR COPIERS #5034    | A      | EXEMPT          | S-M/R         |                   |            |
| 1998-088 S         | WEST GROUP                       | 09/01/1998 | 09/01/1998 | 08/31/2001 | 7,000.00             | 23,000.00                   | ON-LINE LEGAL TRACKING                    | A      | EXEMPT          | C-LEG         |                   |            |
| 98-047 S           | PITNEY BOWES, INC.               | 07/01/1998 | 05/18/1998 | 06/30/1999 | 2,859.00             | 2,859.00                    | PARAGON MAIL SYSTEM                       | A      | EXEMPT          | S-M/R         |                   |            |
| 98-049 S           | CANON U.S.A., INC.               | 07/01/1998 | 05/18/1998 | 06/30/1999 | 1,992.00             | 1,992.00                    | MAINTENANCE & REPAIR OF COPIER            | A      | EXEMPT          | S-M/R         |                   |            |
| 98-050 S           | PITNEY BOWES, INC.               | 07/01/1998 | 05/18/1998 | 06/30/1999 | 1,800.00             | 1,800.00                    | 9337 COPIER                               | A      | EXEMPT          | S-M/R         |                   |            |
| 98-051 S           | PITNEY BOWES, INC.               | 07/01/1998 | 06/04/1998 | 06/30/1999 | 6,368.00             | 6,368.00                    | REPAIR AND MAINTENANCE FOR ELEVEN COPIERS | A      | EXEMPT          | S-M/R         |                   |            |
| 98-053 S           | UNITED PARCEL SERVICE            | 07/01/1998 | 05/18/1998 | 06/30/1999 | 45,000.00            | 45,000.00                   | COURIER SERVICES                          | A      | EXEMPT          | S-GEN         |                   |            |
| 98-089 S           | LEXIS-NEXIS                      | 09/01/1998 | 12/30/9898 | 08/31/2001 | 7,000.00             | 2,000.00                    | LEGAL TRACKING                            | A      | EXEMPT          | S-GEN         | N                 |            |
| Contract Type: STA |                                  |            |            |            |                      |                             |   |        |                 |               |                   |            |
| 1998-015 S         | XEROX CORPORATION                | 07/01/1998 | 06/24/1998 | 06/30/1999 | 8,000.00             | 8,000.00                    | TELECOPIER EQUIPMENT MAINTENANCE          | A      | EXEMPT          | S-M/R         |                   |            |
| 1998-022 S         | ORANGE COUNTY SCHOOLS            | 07/01/1998 | 05/05/1998 | 06/30/2001 | 115,314.00           | 363,528.00                  | REGIONAL COUNSELING SERVICES              | A      | EXEMPT          | S-GEN         |                   |            |
| 1998-040 S         | ZZ - NOT EXECUTED                | 07/01/1998 | 05/05/1998 | 06/30/1999 | 0.00                 | 0.00                        |   | C      | EXEMPT          | S-M/R         |                   |            |
| 1998-072 S         | VISUAL COMMUNICATION             | 08/14/1998 | 08/14/1998 | 06/30/1999 | 45,000.00            | 45,000.00                   | GRAPHIC DESIGN                            | A      | SS              | S-GEN         | Y                 |            |
| 1998-075 S         | WILLIAM M. MERCER, INC.          | 07/08/1998 | 07/08/1998 | 07/30/1998 | 2,250.00             | 2,250.00                    | PRESENT TO TRB - FIDUCIARY COUNSEL        | A      | SS              | C-GEN         | N                 | N          |
| 93-045 C A1        | SCUDDER KEMPER INVESTMENTS       | 03/15/1994 | 11/11/1998 | 03/14/1999 | 0.00                 | 0.00                        | INTERNATIONAL INVESTMENT MGRS.            | A      | RFP-2           | C-INV         |                   |            |
| 98-009 S           | LIEBERT CORP.                    | 07/01/1998 | 05/05/1998 | 06/30/1999 | 3,000.00             | 3,000.00                    | EQUIPMENT MAINTENANCE                     | A      | EXEMPT          | S-M/R         | N                 |            |

| CONTRACT<br>NUMBER | CONTRACTOR NAME                      | DATES      |            |            | ENCUMBERED<br>AMOUNT | TOTAL<br>CONTRACT<br>AMOUNT | PURPOSE                                | STATUS | AWARD<br>METHOD | SERV.<br>TYPE | MBE<br>WBE<br>DVB | SML<br>BUS |
|--------------------|--------------------------------------|------------|------------|------------|----------------------|-----------------------------|--|--------|-----------------|---------------|-------------------|------------|
|                    |                                      | EFFECTIVE  | ACTION     | EXPIRED    |                      |                             |  |        |                 |               |                   |            |
| Contract Type: STA |                                      |            |            |            |                      |                             |  |        |                 |               |                   |            |
| 98-018             | S EASTMAN KODAK COMPANY              | 07/01/1998 | 05/08/1998 | 06/30/1999 | 23,000.00            | 23,000.00                   | CAR MAINTENANCE                        | A      | EXEMPT          | S-M/R         |                   |            |
| 98-020             | S CONTRA COSTA COUNTY SCHOOLS        | 07/01/1998 | 05/05/1998 | 06/30/2001 | 71,915.00            | 226,713.00                  | REGIONAL COUNSELING SERVICES           | A      | EXEMPT          | S-GEN         |                   |            |
| 98-023             | S SAN DIEGO COUNTY SCHOOLS           | 07/01/1998 | 05/05/1998 | 12/31/1998 | 93,240.00            | 93,240.00                   | REGIONAL COUNSELING                    | A      | EXEMPT          | S-GEN         |                   |            |
| 98-024             | S ALAMEDA COUNTY SCHOOLS             | 07/01/1998 | 04/28/1998 | 06/30/2001 | 71,008.00            | 223,852.00                  | REGIONAL COUNSELING COORDINATORS       | A      | EXEMPT          | S-GEN         |                   |            |
| 98-025             | S FRESNO COUNTY SCHOOLS              | 07/01/1998 | 05/05/1998 | 06/30/2001 | 59,511.00            | 184,381.00                  | REGIONAL COUNSELING SERVICES           | A      | EXEMPT          | S-GEN         |                   |            |
| 98-026             | S KERN COUNTY SCHOOLS                | 07/01/1998 | 04/28/1998 | 06/30/2001 | 48,895.00            | 154,142.00                  | REGIONAL COUNSELING COORDINATOR        | A      | EXEMPT          | S-GEN         |                   |            |
| 98-027             | S MERCED COUNTY SCHOOLS              | 07/01/1998 | 04/28/1998 | 06/30/2001 | 17,139.00            | 54,031.00                   | REGIONAL COUNSELING COORDINATOR        | A      | EXEMPT          | S-GEN         |                   |            |
| 98-028             | S SAN BERNARDINO COUNTY SCHOOLS      | 07/01/1998 | 04/28/1998 | 06/30/2001 | 129,898.00           | 409,504.00                  | REGIONAL COUNSELING COORDINATOR        | A      | EXEMPT          | S-GEN         |                   |            |
| 98-029             | S SAN JOAQUIN COUNTY SCHOOLS         | 07/01/1998 | 04/28/1998 | 06/30/2001 | 53,317.00            | 168,082.00                  | REGIONAL COUNSELING COORDINATOR        | A      | EXEMPT          | S-GEN         |                   |            |
| 98-030             | S SAN JUAN UNIFIED SCHOOL DISTRICT   | 07/01/1998 | 06/05/1998 | 06/30/2001 | 115,667.00           | 364,640.00                  | REGIONAL COUNSELING SERVICES           | A      | EXEMPT          | S-GEN         |                   |            |
| 98-031             | S SAN MATEO-FOSTER CITY SCHOOL DIST. | 07/01/1998 | 05/05/1998 | 06/30/2001 | 65,377.00            | 206,101.00                  | REGIONAL COUNSELING SERVICES           | A      | EXEMPT          | S-GEN         |                   |            |
| 98-032             | S SANTA BARBARA COUNTY SCHOOLS       | 07/01/1998 | 05/05/1998 | 06/30/2001 | 51,751.00            | 163,146.00                  | REGIONAL COUNSELING SERVICES           | A      | EXEMPT          | S-GEN         |                   |            |
| 98-033             | S SANTA CLARA COUNTY SCHOOLS         | 07/01/1998 | 04/28/1998 | 06/30/2001 | 101,505.00           | 319,994.00                  | REGIONAL COUNSELING COORDINATOR        | A      | EXEMPT          | S-GEN         |                   |            |
| 98-034             | S SANTA CRUZ COUNTY SCHOOLS          | 07/01/1998 | 04/28/1998 | 06/30/2001 | 48,914.00            | 154,202.00                  | REGIONAL COUNSELING COORDINATORS       | A      | EXEMPT          | S-GEN         | N                 |            |
| 98-035             | S SHASTA COUNTY SCHOOLS              | 07/01/1998 | 05/05/1998 | 06/30/2001 | 69,400.00            | 218,630.00                  | REGIONAL COUNSELING SERVICES           | A      | EXEMPT          | S-GEN         |                   |            |
| 98-036             | S SONOMA COUNTY SCHOOLS              | 07/01/1998 | 05/05/1998 | 06/30/2001 | 48,000.00            | 151,095.00                  | REGIONAL COUNSELING SERVICES           | A      | EXEMPT          | S-GEN         |                   |            |
| 98-037             | S TULARE COUNTY SCHOOLS              | 07/01/1998 | 04/28/1998 | 06/30/2001 | 18,308.00            | 57,715.00                   | REGIONAL COUNSELING COORDINATORS       | A      | EXEMPT          | S-GEN         |                   |            |
| 98-038             | S VENTURA COUNTY SCHOOLS             | 07/01/1998 | 05/05/1998 | 06/30/2001 | 33,188.00            | 104,624.00                  | REGIONAL COUNSELING SERVICES           | A      | EXEMPT          | S-GEN         |                   |            |
| 98-052             | S GTE                                | 07/01/1998 | 05/18/1998 | 06/30/1999 | 4,975.00             | 4,975.00                    | ACD/MIS MAINTENANCE                    | A      | EXEMPT          | S-GEN         |                   |            |
| 98-054             | C DSI INTERNATIONAL MANAGMENT, INC.  | 09/01/1998 | 05/18/1998 | 06/30/2000 | 0.00                 | 0.00                        | DOMESTIC EQUITY ENHANCED INDEX         | A      | RFP-2           | C-INV         |                   |            |
| 98-066             | C ARIEL CAPITAL MANAGEMENT, INC.     | 01/01/1999 | 12/13/1998 | 01/01/2004 | 0.00                 | 0.00                        | DOMESTIC EQUITY MANAGER (SMALL CAP)    | A      | RFP-2           | C-INV         |                   |            |
| 98-068             | C DENVER INVESTMENT ADVISORS, LLC    | 01/01/1999 | 12/15/1998 | 01/01/2004 | 0.00                 | 0.00                        | DOMESTIC EQUITY MANAGERS (SMALL CAP)   | A      | RFP-2           | C-INV         |                   |            |
| 98-073             | S DP MECHANICAL, INC.                | 07/01/1998 | 06/19/1998 | 06/30/1999 | 1,333.00             | 4,000.00                    | AIR CONDITIONING EQUIPMENT MAINTENANCE | A      | IFB             | S-M/R         | N                 | Y          |
| 98-074             | S UNITED CORPORATE FURNISHING, INC.  | 07/01/1998 | 06/30/1998 | 06/30/2001 | 15,000.00            | 45,000.00                   | WORKSTATION CONFIGURATION              | A      | SS              | S-GEN         |                   |            |
| 98-081             | S PRICEWATERHOUSECOOPERS LLP         | 08/16/1998 | 08/16/1998 | 06/30/1999 | 31,900.00            | 31,900.00                   | REAL ESTATE APPRAISAL PROCESS          | A      | EXEMPT          | S-INV         | Y                 |            |
| 98-082             | S JOHN LONGSTAFF                     | 02/15/1999 | 11/02/1998 | 06/30/1999 | 995.00               | 995.00                      | MID-CAREER WORKSHOP PRESENTER          | A      | EXEMPT          | C-GEN         | N                 | N          |
| 98-084             | S JULIET CARTER FRANZEN              | 11/11/1998 | 11/02/1998 | 06/30/1999 | 995.00               | 995.00                      | MID-CAREER WORKSHOP PRESENTER          | A      | EXEMPT          | C-GEN         | N                 | N          |
| 98-085             | S RALPH W. JOHNSON                   | 01/01/1999 | 11/02/1998 | 06/30/1999 | 995.00               | 995.00                      | MID CAREER WORKSHOP PRESENTER          | A      | EXEMPT          | C-GEN         | N                 |            |
| 98-086             | S NATALIE GROSSNER                   | 02/15/1999 | 11/02/1998 | 06/30/1999 | 995.00               | 995.00                      | MID-CAREER WORKSHOP PRESENTER          | A      | EXEMPT          | C-GEN         | N                 | N          |
| 98-087             | C BRIGGS WENGERT ASSOC.              | 11/02/1998 | 11/02/1998 | 06/30/1999 | 100,000.00           | 100,000.00                  | FIDUCIARY TO PROVIDE VALUATION         | A      | RFI             | C-INV         | N                 | N          |
| 98-090             | S FERNANDEZ FINANCIAL ADVISORY       | 01/01/1999 | 11/01/1998 | 06/30/1999 | 995.00               | 995.00                      | MID-CAREER WORKSHOP PRESENTER          | A      | EXEMPT          | C-GEN         | N                 | N          |
| 98-091             | S WORNEL SIMPSON                     | 01/01/1999 | 11/01/1998 | 06/30/1999 | 995.00               | 995.00                      | MID-CAREER WORKSHOP PRESENTER          | A      | EXEMPT          | C-GEN         | N                 |            |
| 98-092             | S SUSAN O'LOUGHLIN WARD              | 12/01/1998 | 12/01/1998 | 11/30/1999 | 50,000.00            | 50,000.00                   | HEALTH BENEFIT FSR CONSULTANT          | A      | SS              | C-GEN         | Y                 |            |
| 98-092             | S F1 SUSAN O'LOUGHLIN WARD           | 12/01/1998 | 01/12/1999 | 11/30/1999 | 0.00                 | 0.00                        | ENCUMBER CHAPTERED LEGISLATION         | A      |                 | S-GEN         |                   |            |
| 98-093             | S STEVE EIFFERT                      | 12/04/1998 | 12/04/1998 | 11/30/1999 | 9,500.00             | 9,500.00                    | DISABILITY SERVICES TRAINING           | A      | SS              | S-GEN         | N                 |            |
| 98-099             | S SUMMIT AIR COMPANY, INC.           | 12/28/1998 | 12/28/1998 | 06/30/2000 | 2,200.00             | 570.00                      | REPAIR AND MAINTENANCE EXHAUST CARBON  | A      | RFQ             | S-MFR         | N                 |            |

| CONTRACT<br>NUMBER | CONTRACTOR NAME | EFFECTIVE  | DATES<br>ACTION | EXPIRED    | ENCUMBERED<br>AMOUNT | TOTAL<br>CONTRACT<br>AMOUNT | PURPOSE                             | STATUS | AWARD<br>METHOD | SERV.<br>TYPE | MBE<br>WBE<br>DVB | SML<br>BUS |
|--------------------|-----------------|------------|-----------------|------------|----------------------|-----------------------------|-------------------------------------|--------|-----------------|---------------|-------------------|------------|
| Contract Type: STA |                 |            |                 |            |                      |                             |                                     |        |                 |               |                   |            |
|                    |                 |            |                 |            |                      |                             | SYSTEM                              |        |                 |               |                   |            |
| 98-100 S           | META DYNAMICS   | 12/14/1998 | 01/21/1999      | 04/13/1999 | 21,945.00            | 21,945.00                   | 3-WAY AGREEMENT WITH DPA FOR SURVEY | A      | EXEMPT          | S-GEN         | N                 |            |
| 98-100 S           | META DYNAMICS   | 12/14/1998 | 01/21/1999      | 04/13/1999 | 21,945.00            | 21,945.00                   | 3-WAY AGREEMENT W/DPA FOR SURVEY    | A      | EXEMPT          | S-GEN         | N                 |            |
| TOTALS             |                 |            |                 |            | \$ 3,776,842.05      | \$ 7,166,394.05             |                                     |        |                 |               |                   |            |

## STRS CONTRACT ACTIVITY REPORT LEGEND

**Contract Types:**

|       |  |
|-------|--|
| "AMD" | Amendment to contract, interagency agreement, or master service agreement. |
| "IAA" | Interagency Agreement  |
| "MSA" | Master Service Agreement   |
| "MRA" | Master Rental Agreement  |
| "STA" | Standard Agreement   |

**Contract Number Suffixes:**

|     |   |
|-----|---|
| "S" | designates funding from Support Appropriation, beginning 1991.    |
| "C" | designates funding from Continuous Appropriation, beginning 1991. |
| "A" | Designates amendment number.                                      |
| "F" | Designates a change in encumbered funds only.                     |

**Contractor Name:** Entity providing services.

**Contract Dates:** Identifies the term of the contract.

|                 |   |   |
|-----------------|---|---|
| "Effective"     | - | contract start date                     |
| "Last Activity" | - | the last date a contract change is made |
| "Expiration"    | - | contract end date                       |

**\$ Amount Encumbered per Document:**

Identifies the amount of money encumbered by the contract or amendment document.

**Authorized Contract \$ Limit:**

Represents the total amount of funds approved for the entire contract term. The authorized amount may be greater than that which is initially encumbered.

**Purpose:** Describes the contract services provided or the purpose of the amendment.

**Status:**

|     |  |
|-----|--|
| "A" | Active contract                            |
| "C" | Completed contract (expired or terminated) |

**Award Method**

|         |   |
|---------|---|
| RFP:    | Request for Proposal (-1,primary or -2 secondary method), Competitively bid |
| IFB:    | Invitation for Bid, Competitively bid                                       |
| SS:     | Sole source approved *  |
| Exempt: | Non-competitively bid **  |

**Service Type:** Includes a general and specific identification.

|       |   |
|-------|---|
| "S"   | Services rendered to the State which may or may not involve the furnishing or use of equipment, materials or supplies, or are performed by an independent contractor.                                   |
| "C"   | Consulting services are of an advisory nature, provide a recommended course of action or personal expertise, have an end product which is basically a transmittal of information either written or verb |
| "INV" | Investment  |
| "LEG" | Legal   |
| "DP"  | Data processing   |
| "GEN" | General   |
| "M/R" | Maintenance and repair  |

**MBE/WBE/DVBE:** Identifies contractor as a qualified Minority, Woman, or Disabled Veteran Business Enterprise.

**Small Business:** Identifies Contractor as a certified Small Business.

\* **Sole Source Contracts:** Certain contracts which would normally be awarded as a result of competitive bid, may be awarded on a "Sole Source" basis in those rare or unique circumstances where STRS has determined that an emergency exists or that there is but a single source for the service, or that STRS' interests are better served by exemption from competitive bid.

\*\* **Exempt Contracts:** Certain types of contracts may be awarded on a non-competitive basis and without a formal exemption approval process. A few examples of such contracts are:

1. Emergency contracts which are necessary for the immediate preservation of life or state property;
2. Contracts for the work or services of a state, local or federal agency;
3. Services for which the State has entered into a master service agreement;
4. Maintenance agreements for equipment that is under documented warranty, or where there is only one authorized or qualified representative, or where there is only one distributor in the area for parts and service;
5. Proprietary software contracts;
6. Contracts for legal defense, legal advice, or legal services;
7. Contracts with business entities operating handicapped workshops, which meet the criteria established by Section 19404 of the Welfare and Institutions Code.



